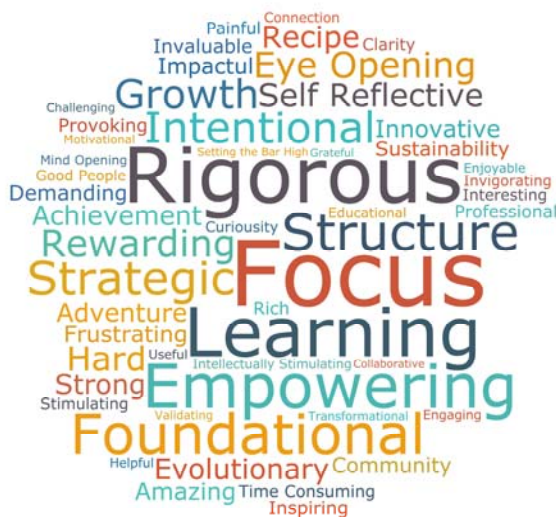# Sustaining Change

PropelNext Alumni Results One Year Later

April 2017

Alumni were asked to identify three words that described their experience participating in PropelNext. The size of each word in the above word cloud reflects the frequency in which it was mentioned, with larger words mentioned by multiple people.

Introduction

In 2012, the Edna McConnell Clark Foundation (EMCF) launched PropelNext to support promising nonprofits in strengthening their capacity to use data for learning, self-evaluation, and ongoing improvement. PropelNext is currently an integrated three-year program that provides each grantee unrestricted funding along with an equal investment in expert coaching, group learning sessions, and a peer learning community. Through the initiative, grantees enhance and sharpen their program models, implement robust performance management systems, and develop organizational cultures that facilitate and practice ongoing learning and assessment.

The first national cohort of grantees (see Exhibit 1) completed PropelNext in 2015 just as a second California-based cohort launched. In an effort to understand how PropelNext contributes to increased capacity and organizational performance over time, the Post Program study focuses on the first national cohort (also referred to as alumni). The goals of this study are to (1) assess how PropelNext has contributed to building and sustaining the performance management capacity of grantee organizations one to two years after participating in the program and (2) identify the most effective elements of the PropelNext capacity building model. Key evaluation questions include:

- What have organizations achieved that can be attributed, in part, to the capacities they built through PropelNext (e.g., growth in services, new funding and/or partnerships, etc.)?

- To what extent have alumni organizations sustained the capacities developed through their participation in PropelNext? How did they sustain them and what conditions facilitated or hindered their efforts?

- What elements of PropelNext were most influential in supporting gains and/or additional progress post PropelNext?

This learning brief highlights key insights and reflections from three focus groups with 12 CEOs and Executive Directors, and phone interviews with 23 program and operational leaders from 12 grantee organizations in late 2016. The overarching purpose of these conversations was to better understand "life after PropelNext" – the organizational challenges and achievements of grantees as well as their reflections on the program and how it can be structured or enhanced to help grantees sustain the work over time. Follow-up surveys were conducted with the 12 CEOs and Executive Directors in March 2017 to dig deeper into several key themes that surfaced during the focus groups and interviews. This study will also include site visits and a second round of data collection in the summer/fall of 2017 to gather additional information and speak to more staff about the extent to which grantees were able to sustain and/or extend their capacities two years post-program, as well as setbacks or challenges that may have impeded their efforts.

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Key Achievements Post-Propel*Next*

Organizational leaders described their Propel*Next* experience as transformational and recognized that they are still "on a journey of discovery" as they work to sustain, deepen, and spread the capacities they developed through the program. Many alumni reflected on specific as well as less tangible achievements such as a heightened awareness that "we now know what we don't know" and an understanding that infusing a learning culture in their organization takes time and continuous effort.

More than a year after completing Propel*Next*, alumni talked about the significant shift in how they think about their work and make decisions. "We always talked about having the head and the heart, but the heart led and then the head came along," one grantee explained. Then it all flipped and "we lead more with the head from a heart-centered place. That was a big shift." Other organizational leaders echoed similar sentiments saying, "We used to make decisions intuitively" but now "decisions are data-driven." Several grantees noted a history of collecting data prior to Propel*Next*, but no history or culture of using it for the purpose of learning and improvement. Data was primarily for reporting purposes and more often than not, sat on shelves and was seldom shared. When asked about reverting to old ways of thinking, leaders openly acknowledged the inherent pull, but as one CEO put it, you "can't go back to what you were before."

"We're still consistently asking ourselves, 'Is this the right data? Is this giving us information we need to answer these questions?' Those weren't questions we were asking before. I think we've gotten smarter … [and] we're still learning how to do it."
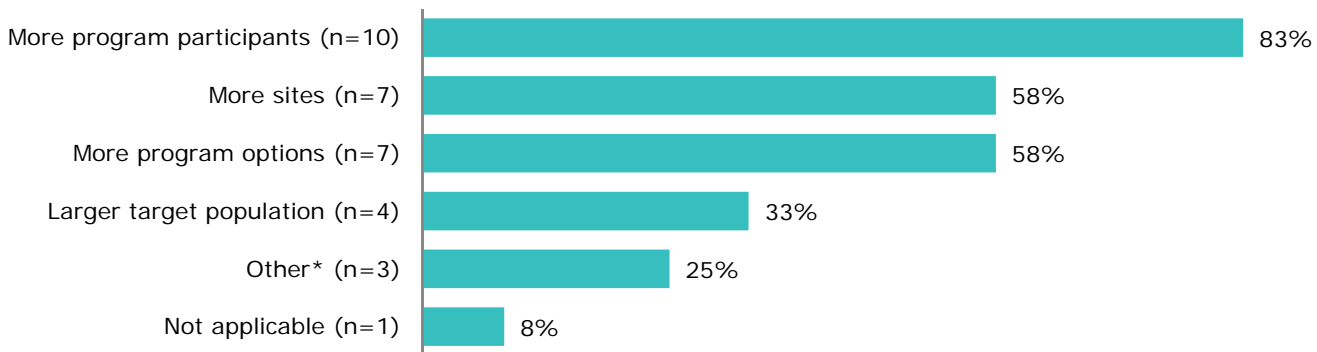
Exhibit 1. Alumni Grantees
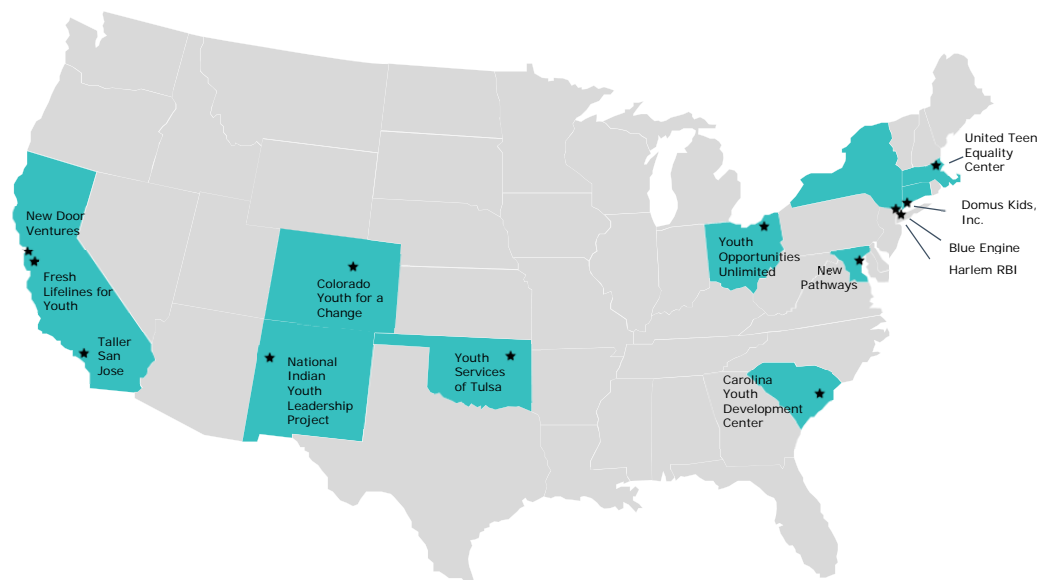
Alumni described specific organizational achievements that they attribute entirely or in part to Propel*Next*. Some of their achievements were initially seeded during the program and have more recently begun to bear fruit. Specifically, they have invested in people, capacity, systems and processes to more fully infuse learning and continuous improvement into their organizational DNA. This section highlights key achievements and reflections from the perspective of organizational leaders.

- **Improved and expanded programming:** Alumni discussed how they have improved the reach of their programs since completing Propel*Next*. The most notable shift is the number of youth being served, with ten of the twelve CEOs saying they have extended their reach. Over half of alumni grantees have also expanded their programming to new sites and have enhanced programmatic options (see Exhibit 2).

Exhibit 2. Examples of Ways Programs Have Expanded (N=12)

More program participants (n=10)	83%
More sites (n=7)	58%
More program options (n=7)	58%
Larger target population (n=4)	33%
Other* (n=3)	25%
Not applicable (n=1)	8%

* Other includes: "Additional staff and more housing"; "Looking at more sites"; "Deeper level of service"

All of the CEOs reported improvements in program quality since the end of Propel*Next*. For example, they've gotten clearer about implementation metrics, which one CEO described as having a "tighter understanding of drivers of classroom-based quality, with internal evaluation of the connection between those conditions and impact measures." Another alumnus described how they are "more clear and precise on our target population, key components of service that all kids need to receive, training of staff, [and] research underpinning programs." Several alumni talked about using the theory of change framework and data to strengthen programming. One grantee explained, "Our theory of change has definitely increased fidelity to our model, as well as the implementation guides. Our regular dashboards have also assisted in enhancing overall learning." Ten of the organizations have increased the number of youth served since completing Propel*Next* in the summer of 2015. The vast majority of those ten organizations (70%) have seen an increase of up to 25% in the number of young people served (see Exhibit 3). At the same time, seven of the CEOs (58%) said implementing programs with fidelity has been difficult post-Propel*Next*.

> "[Doing] what the data suggested would be the most powerful thing for us to use basically led to a shift in dosage but with a real laser focus on the quality experiences for the kids in what mattered the most, rather than just having many instances that weren't necessarily driving impact."

Exhibit 3. Percent Increase in Number of Youth Served (N=10)*

25% or less (n=7)	26-50% (n=1)	51-100% (n=1)	101-200% (n=1)	201%+ (n=0)
70%	10%	10%	10%	
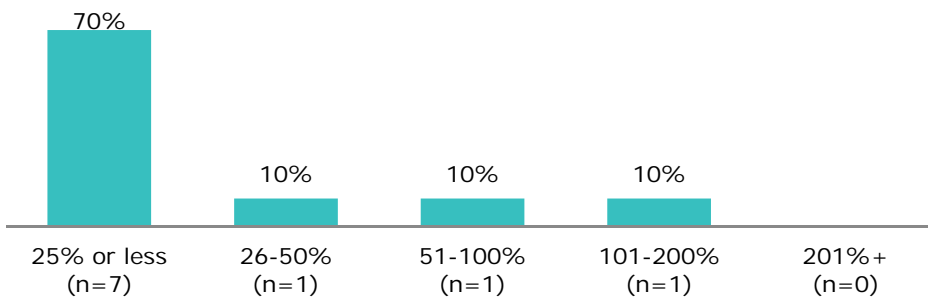
* Two organizations did not see an increase in youth served

- **Increase in overall budgets:** Since participating in Propel*Next*, ten of the twelve organizations have experienced growth in their overall budgets and several grantees mentioned being on the "edge of tremendous growth." Growth can mean many things in the context of an organization – Exhibit 4 shows how annual operating budgets have grown since completing Propel*Next* in summer 2015 - seven of the ten grantees said their budgets increased by up to 25% and the other three grantees saw their budgets grow by 26-50%, 51-100%, and 201%+, respectively.

Exhibit 4. Percent of Overall Budget Growth since Propel*Next* (N=10)*
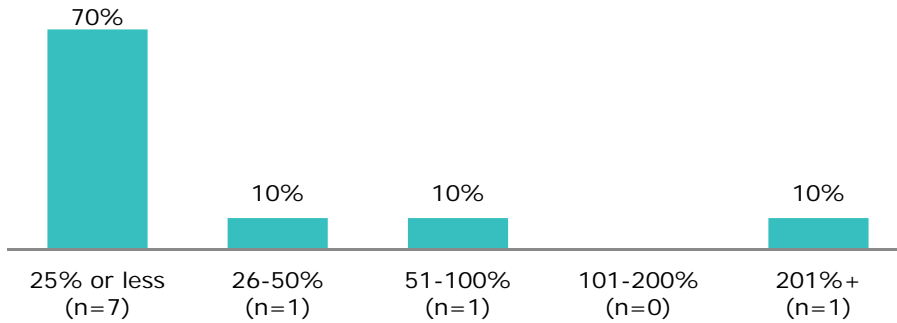
* One grantee did not experience growth and another grantee did not respond to the question

While acknowledging increased budget size as an achievement, grantees also highlighted some fundraising challenges created by growth (discussed later in this report). Several west coast grantees expressed concern about the number of funders in their region who don't "really buy into the learning organization." One CEO said, "Some funders think our success means we don't need more money." Another noted, "We are getting feedback from some of our local funders that we're too sophisticated or too expensive."

Several alumni talked about having to "educate funders." One grantee explained, "We've done a lot of educating of our funders [on] how we do business differently through the program models, theories of change…We're moving to a more of an infographic approach where we are clearly focusing on the outcomes that we produce as well as the outputs." They now "have to do more than just talk about the one kid who came from an abusive home and got her help… Even how we frame our newsletters really is talking differently about your investment and the part you play and trying to get that community buy in."

- **Established evaluation and learning teams:** Since Propel*Next*, most grantees have hired and expanded the capacity of their evaluation and learning teams, creating teams and elevating the role of key evaluation or data staff within the organization. Seven of the twelve did not have dedicated evaluation and learning staff prior to Propel*Next*. Now all alumni have evaluation and learning or research teams. Ten of the twelve teams (83%) have between 1-3 people and two organizations have larger teams. In addition to increasing the number of staff, two CEOs said that evaluation and learning is no longer a middle management position but has since been elevated to a C-suite position within the organization. Another CEO reflected, "As a leader I appreciate that there's more objectivity to leading the work of the organization, rather than it rests on my shoulders as CEO." She noted the strategic value and importance of identifying a "senior level person to manage data learning and evaluation over time" while also acknowledging the added cost. "We've had to increase the investment," she noted, "that's the scary part […but…] it feels right. It feels better and healthier and more lasting."

- **Creating structures and processes to facilitate data-driven decision-making:** Nine of the twelve CEOs (75%) said a culture of inquiry and learning is taking root "to a great extent" across all levels of staff while three CEOs reported they are still in the earlier stages of this process. Many grantees talked about how they've restructured staffing and meetings to facilitate learning and more effective decision-making. As one alumnus explained, "We want to make sure that we are continuously

"[The theory of change has] really influenced the shared language that we use organizationally among staff. Everyone knows the theory of change…definitely the one for their program and [they are] starting to know how they all interconnect."

looking at how we did in order to form how we set our goals moving forward. All of that is directly connected to Propel*Next* work." Others talked about how they've extended the data-driven approach to other operational aspects of their organization from fund development to business planning. For example, one CEO explained how they've extended the approach to an annual operational planning process in which they establish a vision statement for where they want to be in five years. Every department develops goals and deliverables that align with the vision: "It's a whole way of keeping the agency in alignment…That process has just become a part of the DNA. We do it every year." Another said that "Now there's a unified language across programs and fundraising and finance, which I think has been helpful in creating this new lens, this new way of being."

- **Institutionalizing new talent management systems:** With a keener understanding of the skills and attributes needed to strengthen performance management, nearly all grantees talked about changes they've made to their hiring, training, and talent management processes. Several said they do more intentional screening of candidates to assess their learning orientation by asking different questions and probing for history and experience using data. One CEO explained how "Anyone who manages anyone here has to be able to show concrete evidence of ability and a history of using data to learn and improve performance in some way or another." Grantees also discussed adapting new employee orientation practices with one noting all new employees "have to read our theory of change, and then after they read it, part of our orientation is to go deeper with what does that mean." She noted that new people have appreciated the clarity and new hires have said, "It's so clear what I'm supposed to do with my time, what the expectations are."

In addition to shifts in hiring practices, organizational leaders also talked about cultivating the next generation of leaders with one CEO reflecting, "How do we include both those levels in generating the strategic thinking for the organization and not have it just be at the executive leadership team. […] We're moving in that direction. We haven't done that yet but I think for us that's the next step … how do you begin to grow and build an emergent leader level knowing that some of them will go off and take that elsewhere."

- **Communicating a compelling story**: Nearly all grantees said Propel*Next* has helped them bring much more clarity to their work and as a result, they have better information and an enhanced ability to tell their story. Some mentioned creating new and improved results-focused annual reports and learning to talk to boards and funders in different and more compelling ways. One grantee mentioned how the discipline around focus and clarity helped them develop a more compelling roadmap for the organization, noting "the best strategic plan we ever did was post-Propel*Next*." Yet another talked about how they've extended that to their fundraising efforts: "It's been a blessing because we're able to tell a more specific story and talk about outcomes and talk about how smart we are in tracking the work […]. Every day I feel like we're getting more and more on track…Now we're telling a really good, true, very specific, right story."

- **Increased credibility as field leaders**: The work that alumni did in Propel*Next* has increased their external credibility with funders, partners, and peer organizations. Some CEOs have been invited to contribute to affinity groups and speaking engagements; others have played prominent roles leading learning and evaluation discussions as part of collaboratives and community partnership efforts. One CEO explained that agencies and funders "see our organization as being able to replicate evidence-based

"A feature of every [program] meeting is every staff person…from director all the way to the part time line staff…arrives to some sort of data driven decision that they've made before that meeting. We collect these and we use these to understand trends in what decisions are being made at any point in time."

"[Our] commitment to mission is deeper and clearer. The understanding of how we drive towards it is what's been revolutionized. […] we speak more confidently now about our organization as doing social impact work as opposed to just doing good work in the community."

models with fidelity" and another echoed, "We are known in the community for knowing how to do performance management." Educating other funders and "influencing the funding community" was noted by several organizational leaders as an achievement and an ongoing challenge. A few grantees mentioned more effective engagement with policymakers and their enhanced ability to tell their stories to legislators.
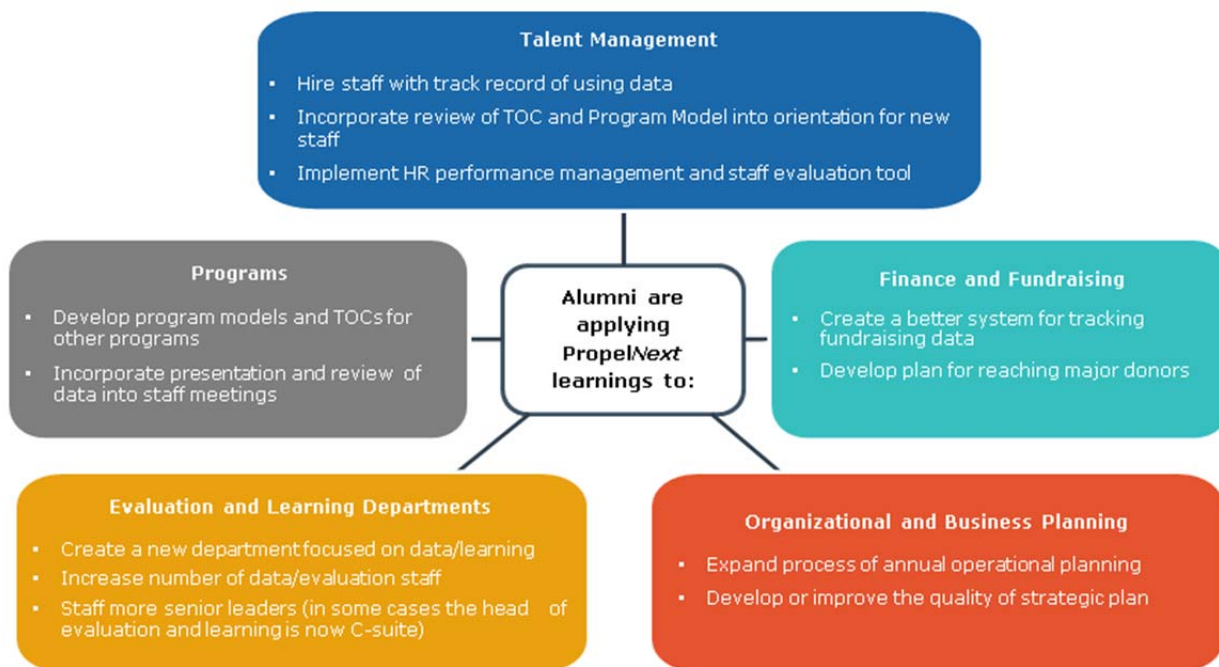
- **Strengthening partnerships**: In addition to increased credibility in their respective communities and circles and clearer messaging, many alumni talked about how they have expanded and improved the quality of relationships with other organizations and community partners. Half of CEOs said that it has been "easy" or "very easy" to engage external partners (e.g., schools) and to attain buy-in from partners on their new way of working post Propel*Next*. Several specifically spoke about their leadership roles in collaboratives and pursuing funding as part of collective impact efforts. One alumnus described how "We've been working together only five months, but the whole Propel*Next* framework [has been] really helpful and at a minimum [is] creating a common agenda and common definitions for that collective impact group. Is it going to be better outcomes? Time will tell."

The graphic below includes examples of ways in which alumni are expanding what they learned through Propel*Next* to other areas of their organization.

> **"Our Propel*Next* experience contributed significantly to our ability to expand into a new community. Not from a resources standpoint, but from a standpoint of feeling confident that we could continue to deliver services and not undermine quality [or] impact, and to be clear to the community about what it was we were actually bringing."**

Talent Management
- Hire staff with track record of using data
- Incorporate review of TOC and Program Model into orientation for new staff
- Implement HR performance management and staff evaluation tool

Programs
- Develop program models and TOCs for other programs
- Incorporate presentation and review of data into staff meetings

Alumni are applying Propel*Next* learnings to:

Finance and Fundraising
- Create a better system for tracking fundraising data
- Develop plan for reaching major donors

Evaluation and Learning Departments
- Create a new department focused on data/learning
- Increase number of data/evaluation staff
- Staff more senior leaders (in some cases the head of evaluation and learning is now C-suite)

Organizational and Business Planning
- Expand process of annual operational planning
- Develop or improve the quality of strategic plan

Facilitators and Challenges for Sustaining Change

Since completing the program, alumni have been working to sustain and further build their organizational muscle to institutionalize performance management practices. Many grantees described the twelve months after completing the program as a time to process and reflect. According to one CEO, "There was a stage at which there was a lot of beating ourselves up about what we weren't doing [...] We have more information now. We're doing better and that will continue to happen, but [we shouldn't] hold judgment or regret or shame for where we weren't three years ago." Several CEOs said some of their biggest revelations came after completing Propel*Next*, when they had time to reflect on the experience. One CEO noted that they are still actively learning and the "answers [to the focus group questions] would have been different a year ago."

Grantees described both facilitators and challenges as they strive to sustain and deepen the learning and performance management culture. While all grantees firmly believe Propel*Next* has changed the way they do business, five of the twelve CEOs (42%) said that sustaining the momentum has been difficult. Grantees spoke of the iterative, fluid, and long-term nature of organizational change and the resilience needed to lead a learning organization. One grantee explained: "Over this last year there's been a tremendous evolution about what [being a learning organization] means. I think there's a greater acceptance that it's a journey, a process of learning [...] we have more acceptance that it's an iterative process, that you never arrive anywhere but that you're just in a process of evolving, instead of this holy grail idea of how it will be done and what it will look like when we are a perfect learning organization."

Key Facilitators

The key facilitators most frequently mentioned for cultivating a learning and performance management culture included (1) the disciplined use of the theory of change framework, (2) continuous engagement of internal stakeholders, and (3) intentionally shifting the narrative about learning and data use.

Theory of Change provides a guiding framework

Alumni organizations highlighted the important role the theory of change has played in bringing structure, focus, and intentionality to programmatic and organizational decision-making. The Propel*Next* program includes an intensive focus on developing research-informed program models with defined target populations, program components, hypotheses, progress indicators, and outcomes. One CEO explained, "The theory of change acts as a life preserver as things change" and it's used to guide conversations about how to fully align their system and data use. The theory of change also helps bring greater focus and clarity, "It's helped us be a lot more intentional," one grantee said, "It helps us understand what's important and what we need to really pay attention to versus traveling down rabbit holes or getting caught up in white noise." Another noted, "Using the tool as a way to frame conversations about fidelity to the program model" and to "help ground us because it's very easy in this line of work to get distracted by the way things used to be" and the everyday challenges that arise in a service delivery environment.

When asked about their ability to practice this framework after Propel*Next*, half of the CEOs (6 out of 12) said it has been "easy" or "very easy" to extend this practice to other programs. Along the same lines, five of the CEOs (42%) said it has been "easy" or "very easy" to extend the theory of change framework to other parts of their organization.

> **"[The Theory of Change] is used every day. . . It's used in staff meetings. It's used to remind people how we deliver the work. It's helped us to remember the questions that we are trying to understand and learn from our team as we look to understanding what's working and what's not."**

At the same time, they acknowledged the continuous need to learn and adapt. "Obviously our metrics and our tools are not static," a grantee described, "They're all dynamic and evolve as we evolve with this organization, but just having the intentionality at the front end … it really allowed us to be very, very clear about what high performance is, and how do we get there." While several grantees have developed program models for most or all of their programs, a couple grantees mentioned the difficulty of creating theories of change for each of their programs. One grantee explained, "We officially have five programs, four of them have a program model. What I uncovered was that the theory of change process was too arduous to do for each one. . . I have taken the theory of change model and what I learned in Propel*Next*…and I'm doing an organizational [theory of change]… one big theory of change that I'm going to roll up [the four programs] into."

Engaging staff, board, and key stakeholders

Grantees have been testing a number of strategies for engaging staff and boards. One grantee mentioned starting a group learning session with staff, noting it's "changing the way we do business." Several organizational leaders talked about the use of tools, frameworks, dashboards and their theory of changes to engage and generate dialogue. "We use [the theory of change] for staff training and onboarding new staff," one person said. "It's a good communication tool both with our staff and internal audiences and also with external audiences. I think it's a real clear design of what we're trying to do and what we're trying to accomplish with the young people we work with."

Seven of the twelve CEOs (58%) said engaging the board and cultivating commitment for capacity building has been "easy" or "very easy" post Propel*Next*. Grantees are bringing more data and high-level reports to board meetings and engaging members in discussion about data and results. One alumnus explained, "We try to provide a monthly report to our board, a very top level report on what is happening with our programs, specifically by using this data…They certainly appreciate the anecdotes that we tell them, bringing some students in, or bringing some staff members in to talk about what they do and why they're doing it, but when they can see the real numbers - because a lot of them are numbers people - they say, 'Oh wow, this stuff really works.'" Still another grantee described how they are using data with both staff and the youth in their programs. "We were able to create some real-time dashboards that I would say are being used probably on a daily basis in some form or another and we're really excited about how staff are using it with the youth to engage them in self-assessing their progress in the program."

Changing the narrative

All CEOs reported that a culture of inquiry and learning is taking root at varying degrees across organizational functions including operations, finance, fund development, talent management, and communications. Grantees described a multitude of ways they are changing the conversation and shifting mindsets about the types and uses of data. Many CEOs talked about making a clearer distinction between data for accountability and data for learning. One reflected on the shift from focusing on data for the sole purpose of accountability and reporting to an approach that now includes a learning agenda driven by questions focused on program improvement. "Data should be in service of testing assumptions," he noted. Another CEO reflected, that before Propel*Next*, "we were collecting a lot of data but not using it." They have since become much more thoughtful about what they collect and make sure it's aligned with a clear and valuable outcome. The conversation has changed to "what is the data telling us?" leading to more "thoughtful and less emotional" decision-making. Previously, they approached the work with a checklist mentality rather than an ingrained orientation for learning and inquiry. One grantee said, "I don't think we were thinking about constant

"We're hearing a lot of different conversations at the staff level…we're hearing questions of, 'What does the data say? Is that consistent with what we're seeing in the data?'"

learning and improvement and really having it be in the DNA of the organization. We still have a long way to go, but I think that whole concept of ongoing learning is the major shift."

Alumni appreciated the objectivity they now bring to their decision-making, thanks in part to the theory of change framework. "It's not politicized in the organization" or about someone's favorite project or who is a strong leader, but rather "is the program strong?" Another grantee concurred: "It's just understood throughout the organization that what we are looking to understand is [whether this program is] impactful for youth. It's not [a question of] do we like the program? It's not do we like the people who work at it? It's none of that. It's [are we] having the impact that we want? Is it pushing toward the outcomes that we know are critical for youth?"

Key Challenges

Alumni talked about the iterative and long-term nature of their work, describing it as a journey, not a destination, with plenty of challenges and detours along the way. The most common challenges that surfaced during interviews and focus groups relate to the inherent internal challenges of change management, as we summarize below.

Getting the right people on the bus

Talent management continues to be one of the top challenges for many Propel*Next* alumni. One CEO described their iterative process of unpacking talent management issues by first reflecting whether it's an issue of skill or an issue of will: "If it was a skill issue [then we ask ourselves] 'how do we build their skills, and how quickly can we build them, and how much should we invest in building them, and where do we get the resources to do that?'" Nearly all organizations talked about the reality of losing staff that lacked the will or ability to shift to new ways of doing business. "We did almost a complete re-tooling of what we had done before," one leader reflected, from on-boarding to interviewing "long-term staff members that couldn't adjust to those changes, so there was a lot of change for our organization that we probably did not anticipate before Propel*Next*." While talent management will always require ongoing attention, organizational leaders felt Propel*Next* helped better equip them for these changes.

Integrating and aligning efforts across the organization

While grantees have made some noteworthy progress extending performance management capacities beyond the initial program, most acknowledge that it's been difficult to fully integrate and align efforts across the organization. Six of the twelve CEOs said it was "difficult" or "very difficult" to align and integrate across departments. The majority of alumni felt there is still considerable work to be done to more fully integrate and deepen performance management practices and strategies throughout the organization.

Ensuring financial sustainability

Funding was a hot topic and many alumni are grappling with how to sustain the real costs of operating at a higher level. Eight of the twelve CEOs said it has been "difficult" or "very difficult" to improve overall financial sustainability of new positions and/or infrastructure since completing Propel*Next*. In addition, four CEOs said it has been "difficult" or "very difficult" to secure funding from new sources. Grantees in various locations described a common challenge of "moving from one league to another league" and not being able to access larger national funders. Some attributed this lack of access as a result of not having third party evaluations of their programs. A few alumni organizations said they've been working hard to

"[We are] trying to figure out how to find that learning voice in a culture that doesn't seem to really support it in the nonprofit community."

educate funders and are slowly seeing some shifts. Alumni also mentioned the "many different funding streams to weave together… always chasing money and working with systems … sometimes taking your eye off the outcomes work."

Feedback on Propel*Next* Supports

Most alumni understood they were part of the first pioneering cohort participating in a capacity building model that was still being developed, tried, and tested. One referred to it as "uncharted territory."

What works well

Grantees appreciated the structured approach and accountability, pushing them to accomplish things they otherwise would not do. When asked what aspects of the program were most influential in spurring and sustaining their progress post Propel*Next*, alumni emphasized different aspects of Propel*Next* that were most important to them. These aspects are presented here, with the most frequently mentioned aspects presented first.

- **Organizational coaching is a game changer**: Alumni organizations had universally high praise for the quality and value of individual coaching and technical support, with one person noting, "The technical assistance we received was world class and pushed us in a direction and advanced us in a way that we could have never done. That was really a big part of propelling us." Others noted how they appreciated hearing the "hard truth around staffing" and how coaches "pushed you in uncomfortable but productive ways." One person reflected, "If I look back at what we were able to identify slowly and adjust, I don't think we could have done it without [our coach's] feedback and challenging. I remember having to have a lot of meetings with staff who were, quite frankly, mad. Not necessarily at [our coach], but for putting them in that position … to ask about how they do their job and then to be challenged on why they do [it] that [way] … to say, 'Well, how do you know you're doing a good job?'" Several grantees noted some uneven coaching and a lack of alignment but still valued the overall quality of the coaching team. As one CEO expressed, "[The coaches] just have this tremendous ability to meet organizations where they're at and coach them on the next thing. There were some [coaches] that were better fits, but they all have that kind of wonderful quality so for me that's the game changer part of it."

  > **"There's something about having someone [a coach] who isn't as intimately attached to your programs and your organization… having that perspective is valuable."**

- **The power and potential of the peer learning cohort model:** Grantees lauded the peer learning and opportunities to develop deeper relationships with other members of the cohort. They appreciated the opportunity to "get away from the office" and "being forced to go someplace and really focus on the work" and even more importantly to develop deep and lasting relationships with peers in their cohort. As one grantee reflected, "For us as an organization, everything happens in the context of a relationship" and the opportunity to come together on a regular basis, to "go out to dinner and have drinks on occasion…really developed a trust where agencies were willing to take risks in doing business differently. I think that all that was pretty critical, I don't think this would've worked in email and conference calls." Another CEO commented that the level of trust they developed as a group created important space for peer learning, support, and growth. "As a CEO there's not a lot of places where you can be super transparent and vulnerable, and so it's nice to have that space." Other organizational leaders were enthusiastic about the post-Propel*Next* opportunities to connect.

  > **"I always love when we get together. In whatever form it takes, I always walk away with a new idea [...] I do feel like I have a community I didn't have before."**

- **Focus on talent management:** Talent management is a major challenge of the Propel*Next* model, and grantees valued the support on a range of talent management issues, from the more tactical task of developing job descriptions to the more nuanced challenges of managing organizational change. One organizational leader specifically valued the quality of the coaching saying "some of the real hard truths around staffing" and the coaches' ability to see "around the corners" helped them more effectively navigate talent management issues. Others talked about tactical support in developing job descriptions, establishing learning and evaluation departments, and building more comprehensive talent management systems. "Now we have a talent management system and we have onboarding and we have many more tools and systems in place in thinking about staff," one alumnus said.

- **The role, responsiveness, and leadership of EMCF staff:** The alumni found the EMCF team to be transparent and highly responsive. "I truly have such tremendous respect for the foundation [...]. The role modeling of having high standards, being demanding, hard work... being stretched beyond what we thought we were capable of in the beginning. The hard part was there but there was also great humility." Grantees also felt heard and that the foundation struck the right balance between accountability and flexibility. "I felt very inspired to meet a funder that had both the sophistication and the humility that really made it safe to be vulnerable, to pull apart who we were, what we were doing, and putting it back together. I don't think I could've done that with an arrogant foundation." Another grantee appreciated EMCF's ability to create space for grantees to be vulnerable without feeling judged. Another reflected on the many open and sensitive conversations saying, "I never felt judgment. I never felt fear to be honest. I think they really created a safe space for that to happen and in fact I felt like the more honest and vulnerable I was the more enriched the relationship with EMCF. I think that's a unique experience."

- **Large group learning sessions**: Feedback on the large group learning sessions was mixed with mostly highly positive reviews and others who felt the time could be better utilized. On the positive side one grantee noted, "The learning sessions were always really well done and a really great use of time; great readings, great facilitation, great breakouts." Another commented, "I can't say enough about how much I got out of them, the presentations, the activities. I always left the Propel*Next* convenings charged up, fired up and ready to come back and do something, and we did." Conversely some other grantees felt the content was not always well aligned, but there was nearly universal appreciation for the camaraderie and the opportunity to spend time with their peers.

Opportunities for Improvement

When asked how the Propel*Next* program could change to better support grantees and strengthen results, alumni had a variety of reflections. As previously mentioned, several grantees said the year after Propel*Next* has been full of reflections and ongoing learning. One grantee said it would have been nice to have a "phase out period" noting, "it's all in and then it's all gone. That might be something to be thinking about moving forward." At the same time she noted the break has been "healthy" and created time and space for them to process and apply what they learned. Other programmatic considerations are highlighted below and it's worth noting that the current California cohort is already benefitting from these refinements.

- **More guidance on fiscal issues and sustainability**: One grantee mentioned guidance in developing a business plan with a fiscal component.

"There are a lot of savvy philanthropists that think of themselves as investors. We are beginning to be able to attract them because of the level of conversation we can have about social return on investment, but this work hasn't gotten us all the way there…It's time-consuming because it's about the relationship building."

Several alumni said it would have been helpful to have more guidance around sustainability and how to access to new funding streams and connect with other opportunities. One grantee wanted to know "What kind of doors can this open with other funders?"

- **More guidance on alignment and integration:** Some alumni also asked for more direction on how to align the Propel*Next* work with other aspects of the organization such as finance, talent management, and communications. There is a need for the Propel*Next* work to move in parallel with other aspects of the organization and this type of guidance, according to one grantee, was "woefully missing." Another alumnus explained the need to more intentionally "align other organizational issues with the work, even if you don't go deep."

- **Cultivate and sustain a community of practice:** Alumni clearly appreciate opportunities to convene and connect. Several grantees said they would like to continue to meet as a learning group and talk about obstacles or issues: "There are very few nonprofits who speak the language, and with Propel*Next* ending, I really appreciate having conversations about data and learning with people who have been to the same school, including the current cohort. They may not be as far along, but we can speak the same language and get to closure much more quickly than my other peer nonprofits that we may be doing work with, to whom this is just alien." While in-person gatherings are logistically costly and challenging, alumni said even conference calls or webinars would be useful. One CEO suggested quarterly topics of interest with pre-reading materials and a conference call for CEOs. Another echoed, "I would much prefer that to the online community, because [it] feels like email, whereas the webinar approach or the Google Hangout approach really feels like community."

- **Booster workshops or consulting for staff**: A number of grantees mentioned the value of "booster shots," or relatively brief workshops or follow-up consultations with their coach. This has been particularly valuable for organizations that have experienced staff turnover or other implementation challenges after Propel*Next*. One CEO said that their coach came back to give a four hour "fear of change 101 with my leadership team which was really, really, really helpful." The coach provided a refresh on program model development and "from there, [we] were able to develop the program really quickly. It would've been hard without that to get people along." Another commented, "There's been so much turnover in those [mid-level] roles that there's not the same level of relationship [with cohort peers]." They suggested doing "something that's more focused and targeted. Something not dependent on the past relationships, but more on the practice."

"People want more data. They're not as afraid of it as they used to be and they actually see the value of learning from this information."

Conclusion and Considerations for the Future

One year after completing the Propel*Next* program, alumni organizations described their experience as transformational. Despite the inherent pull of old habits and mindsets, grantees all shared examples of ways that they are infusing a learning orientation throughout their organizations. Grantees openly acknowledged the iterative nature of building a high performing, learning organization and the commitment and focus required to stay the course. When we asked alumni what success looks like two to three years post Propel*Next,* their responses were well aligned with the long-term outcomes outlined in the Propel*Next* Theory of Change (see textbox to right). While some grantees mentioned sustainability and growth in budgets and programming, most focused on interim outcomes such as improving program quality, developing and managing talent, and making data-informed decisions at all levels of the organization. Ultimately they seek to improve outcomes for disadvantaged youth and grantees firmly believe their focus on quality and more effective decision-making will get them there.

Grantees unequivocally said that they would "do it all over again" and were grateful for the opportunity to participate. Despite internal and external challenges, there is strong evidence that grantees have sustained and continue to build upon what they learned through Propel*Next*. Key themes and takeaways include:

- **More resources and infrastructure to support learning and evaluation:** While grantees continue to grapple with sustainability issues, ten of the twelve grantees (83%) said their organization's overall budget has grown since completing Propel*Next.* All grantees now have a dedicated learning and evaluation staff member or team. This is a considerable shift given seven of the twelve organizations (58%) did not have any learning and evaluation staff prior to Propel*Next*.

- **Increased focus on program quality and expansion**: The majority of grantees said their focus has been on quality improvement and not expansion. Nonetheless, nearly all grantees are expanding their programs in a variety of ways including serving more participants, expanding programming to new sites, offering more program options or serving a larger target population. All grantees believe they have made important quality improvements which they attribute to increased clarity, focus and intentionality, thanks in part to the effective use of the theory of change framework as well as more effective use of data.

- **Greater focus on hiring and cultivating talent**: Grantees provided numerous examples of how they are shifting their practices and culture with a more disciplined and people-focused management structure. Grantees provided examples of staff development and training activities as well as shifts in recruiting, hiring, and on-boarding new staff. Some grantees mentioned making changes to their internal communications strategies and performance review processes.

- **Infusing a culture of inquiry across the organization**: While the initial focus of Propel*Next* is on a single program model and theory of change, grantees continuously underscored the impact Propel*Next* has had on other programs and aspects of their organization. Perhaps the most compelling finding is how the Propel*Next* experience continues to influence organizational practices, processes, and culture. Nine of the twelve CEOs (75%) strongly believe a culture of inquiry and learning is taking root across all levels of their organization and the remaining 25% believe they are in the early stages of this process.

> **Propel*Next* Theory of Change Long-term Outcomes**
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> - More youth organizations use data to generate insights that inform their work.
>
> - Organizations are stronger, capable of delivering better results and more prepared for evaluation; this increased potential for funding and expansion.
>
> - There is greater understanding of the most effective and efficient ways to build nonprofits' capacity to use data for learning and ongoing improvement.

"I don't know that we've seen great variation in terms of outcomes for youth, but we have certainly seen an increase in service level, and part of that, I think, has been because we've been able to really feel strongly about the foundation of our program and the work."

In closing, the alumni cohort shared key reflections and words of wisdom for current and future grantees as they embark on this journey. First and foremost, alumni have come to appreciate the importance of trusting the process and investing the time. "This is intense work and you need to dedicate the time to fully benefit. It requires you to look differently at everything you do." Another echoed, "For three years, this is going to be a significant portion of one person's job. If you don't have somebody almost full-time devoted to this project, your organization is going to suffer, and not just with Propel*Next*, but all the other projects they're working on." Yet another cautioned over-reliance on tools, noting tools are helpful but "it's really about building the muscle," and that requires time and commitment. "It's a process. Be open to it. There's probably no exact finish line even now for us."

Alumni also encourage future grantees to engage stakeholders and leverage their peer networks. One CEO reflected, "I probably would've spent a little more time on bringing some other key influencers involved in it early. We actually did do that in the middle, and it was very, very helpful to us." Grantees also value the depth of the relationships they've developed with members of their cohort. One advised "to invest in the peer group and learn from each other and reach out to each other in times when you have questions." Another grantee reflected on the importance of peer support as well as the opportunity to strengthen the sector: "This is really, really hard work so I think it is valuable to feel you're part of something that's greater than yourself as a leader of your organization, that you're a part of elevating the nonprofit sector, and you're a part of trying to create a new standard of doing things for our most vulnerable kids."